NEDSS Base System Report Administration User Guide

Prepared by

U.S. Department of Health and Human Services

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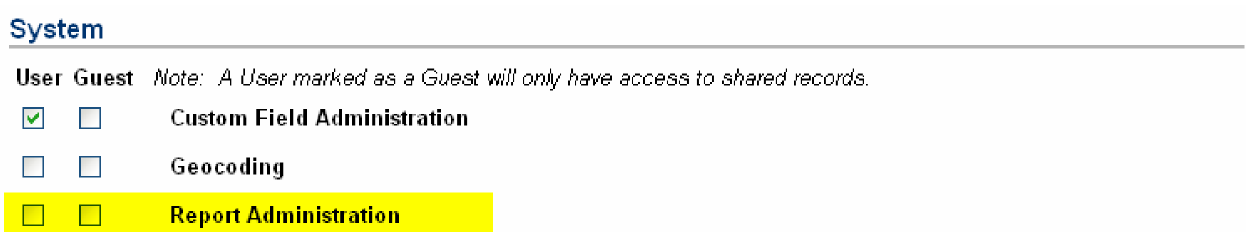
In previous versions of the NBS, all new data sources and reports were exposed in the NBS by executing SQL scripts. System administrators had the ability to create custom SQL scripts for their own unique reporting needs and most of those scripts came from periodic NBS releases. To help make this process easier the NBS Team has introduced the Report Administration module. The Report Administration module provides system administrators the ability to create and maintain data sources and reports through the NBS graphical user interface.

A new permission set was added for the Report Administration functionality. For existing NBS states, it is important to note that none of the existing permissions sets will have 'Report Administration' checked, meaning that the state will need to manually change an existing permission set in order to give 'Report Administration' permission to a user(s).



The user can navigate to the "Report Administration" module by logging into the NBS with a user ID that includes the Report Administration permission. The user then selects "System Administration" from the Main Menu Bar and then "Report Administration" from the drop-down choices.

3 Working with Data Sources

The reports that are available in the NBS are supported by various data sources (e.g., tables, views, data marts, etc.) that are available in either the NBS Operational Data Store (ODS) or the NBS Reporting Data Base (RDB). This section focuses on the following:

- Viewing Existing Data Sources
- Creating or "Registering" a Data Source
- Editing a Data Source
- Editing or Deleting Data Source Columns
- Mapping Data Source Columns to SRT Code Sets

3.1 Viewing Existing Data Sources

Selecting "Report Administration" allows the user to manage either Data Sources or Reports. On the "Report Administration" page, the Data Sources and the Reports hyperlinks are available.

Selecting the "Data Sources" link allows the user to register a data source and to view a list of existing registered data sources. The data sources are displayed in a table in this view.

Home | Data Entry | Merge Patients | Investigations | Reports | System Admin | Help | Logout

Data Sources

User: User Demo

Return to Report Administration

Register Data Source

Data Sources

Data Source Name	Title	Description	Secure	Create Date
nbs_ods.PHCDemographic	Disease Counts by County	Disease Counts by County sumarized to the Case Level	No	
nbs_ods.PHCDemographic	Line List of Diseases with NBS Security	Disease Counts by County sumarized to the Case Level	Yes	
nbs_ods.PHCDemographic	Jay test nbs_ods.PHCDemographic	Jay test nbs_ods.PHCDemographic	No	12/03/2007
nbs_ods.deduplication_activity_log	Deduplication Activity Log	Deduplication Activity Log	No	

By clicking on the "Data Source Name" link, the user is able to see the columns associated with the data source as well as any reports associated with this data source:

View Data Source

User: Super User

Return to Data Sources

Create Column | Create Report | Edit | Delete

Data Source (NBS_ODS.PHCDEMOGRAPHIC) | Data Source Columns | Associated Reports

Data Source (NBS_ODS.PHCDEMOGRAPHIC)

Back to Top

Name: NBS_ODS.PHCDEMOGRAPHIC
Title: Disease Counts by County
Description: Disease Counts by County sumarized to the Case Level
Secure by Program Area and Jurisdiction: No

Data Source Columns

Back to Top

		Column Name	Title	Description	Type	Advanced Filter	Column Selection
Edit	Delete	County	County	County	STRING	Y	Y
Edit	Delete	ELP_class_cd	ELP Class Code	ELP Class Code	STRING	N	N
Edit	Delete	ELP_from_time	ELP From Time	ELP From Time	DATETIME	Y	Y
Edit	Delete	ELP_to_time	ELP To Time	ELP To Time	DATETIME	Y	Y
Edit	Delete	ELP_use_cd	ELP Use Code	Entity Locator Type such as H for home, WP for work	STRING	N	N

NOTE: The user can delete the data source itself from this page. However, the data source cannot be deleted if there are any reports associated to it. If there are no reports associated, the data source can be deleted by clicking the delete button.

IMPORTANT: Since data sources that come with the NBS "out of the box" (that support the NBS "out of the box" reports) can be deleted, extreme caution should be taken when considering the deletion of a data source.

3.2 Creating or 'Registering' a Data Source

The user can register either an existing data source or a state-created data source. When registering a data source, the data source name must match the exact name of the data source in the ODS (e.g., nbs_ods.PHCDemographic) or the RDB (e.g., nbs_rdb.LAB100).

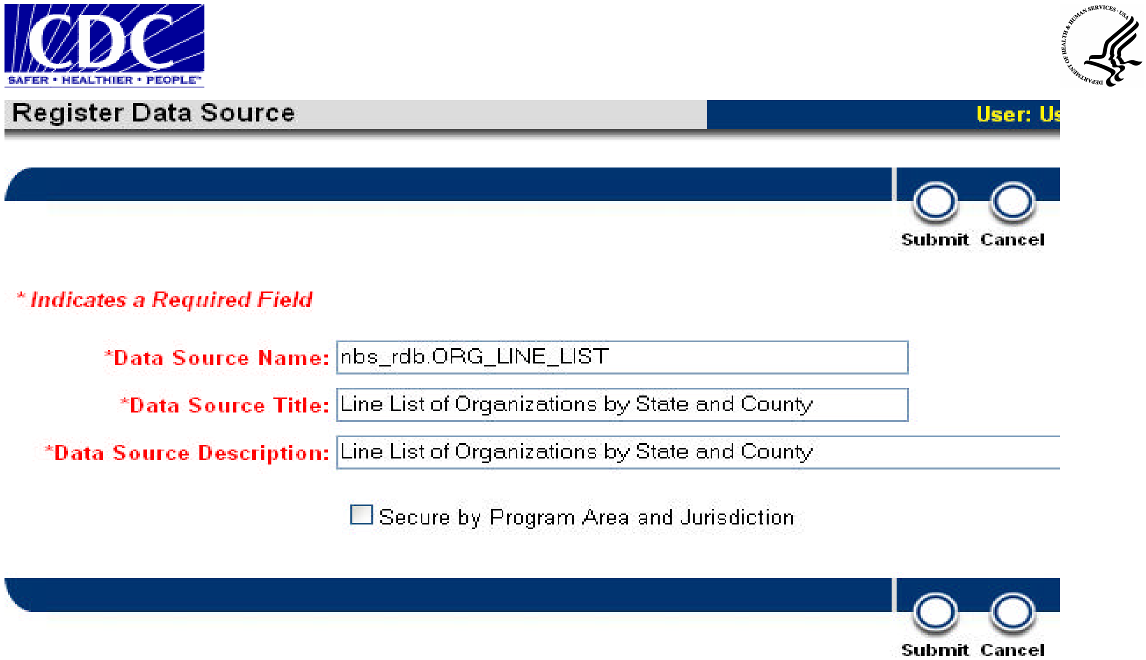
Since multiple data sources with the same name can be registered we recommend that each Data Source Title and Data Source Description be unique and identifiable. When a user picks the data source from the 'create report' screen, the data source title gets pre-populated based on the selected data source, which helps the user identify the applicable data source.

Registering an existing data source (e.g., nbs_ods.PHCDemographic) would most likely be done if the state wants to edit, delete, or add columns for an existing data source and then create new reports from this modified data source.

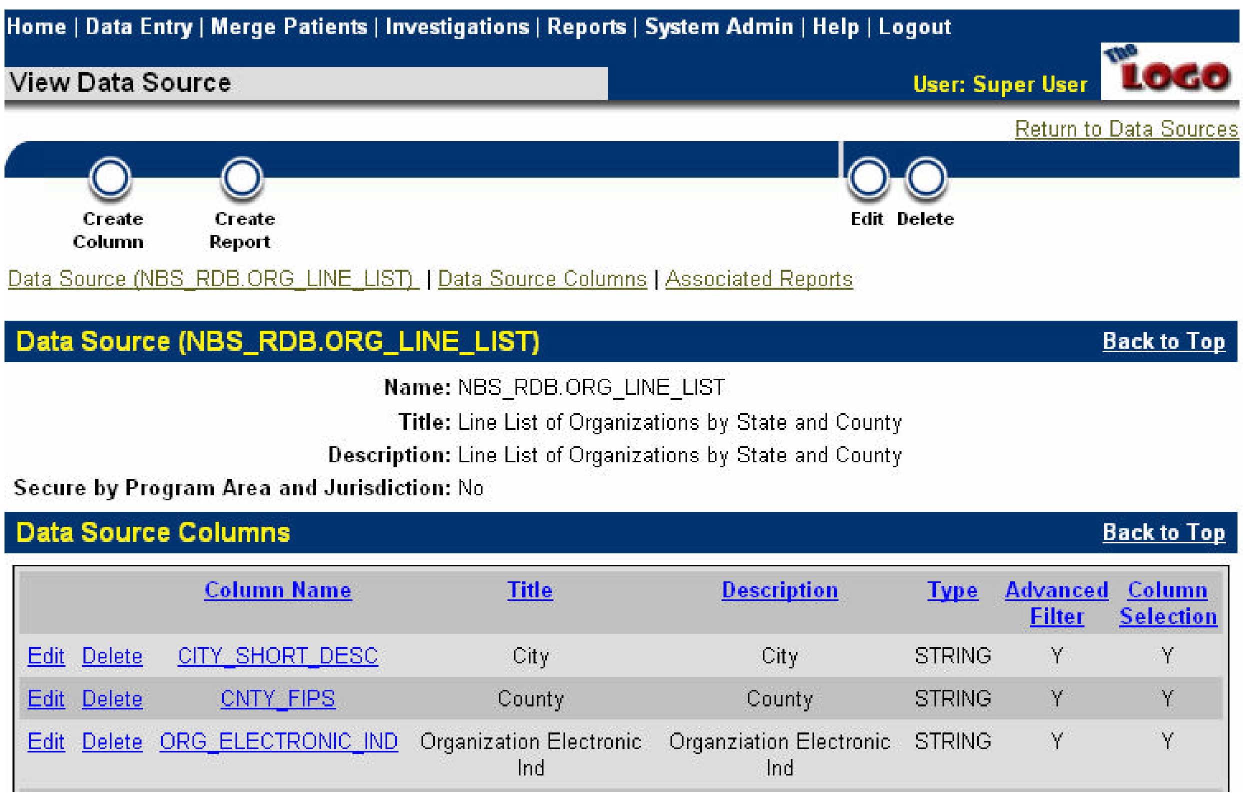
Registering a data source can be done by completing the following steps:

1. Click the "Data Source" hyperlink on the Report Administration page
2. Click the "Register Data Source" button
3. Enter the data source name (e.g., **nbs_rdb.ORG_LINE_LIST**)
4. Enter Data Source Title and Data Source Description
5. Secure by Program Area and Jurisdiction = **(Blank)**

NOTE: (IMPORTANT) The 'Secure by Program Area and Jurisdiction' option is only valid for data sources that contain the **program_jurisdiction_oid** data source column.



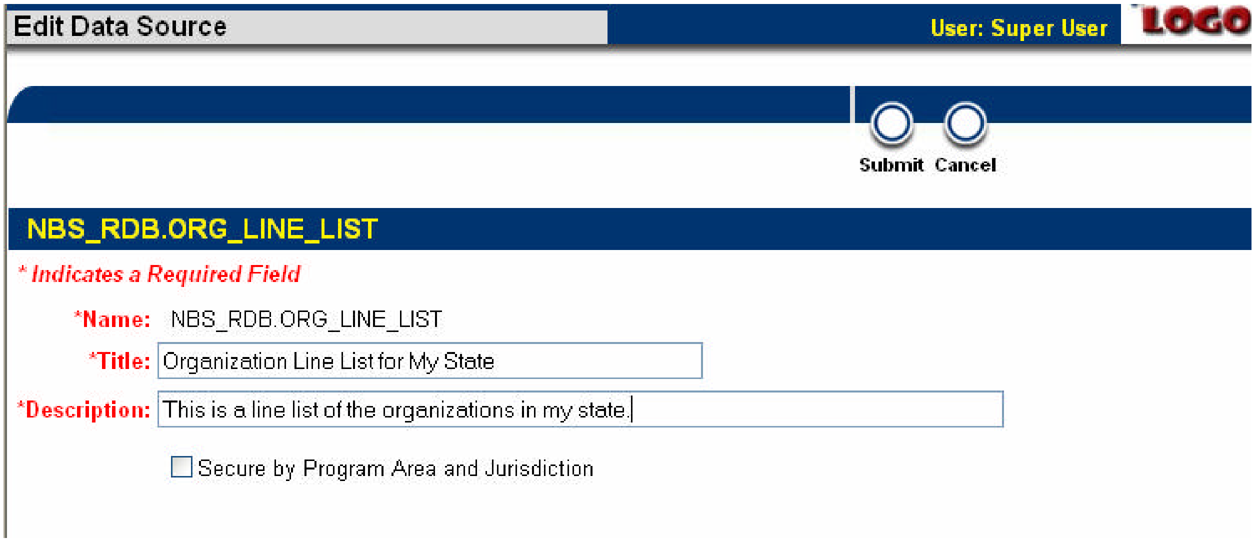
6. Click Submit
7. View Data Source page is displayed with all data source columns



3.3 Editing a Data Source

1. From the ‘Report Administration’ screen, select ‘Data Sources’
2. Click on the name of the data source
3. Click the ‘Edit’ button

4. The ‘View Data Source’ screen is displayed; the user may edit the name and the description of the data source



3.4 Editing or Deleting Data Source Columns

1. From the ‘Report Administration’ screen, select ‘Data Sources’
2. Click on the name of the data source
3. To edit a data source column, click the edit link next to the column and make the appropriate changes (more details on editing a data source columne can be found in Section 3.5)
4. To delete a data source column, click the delete link next to the column

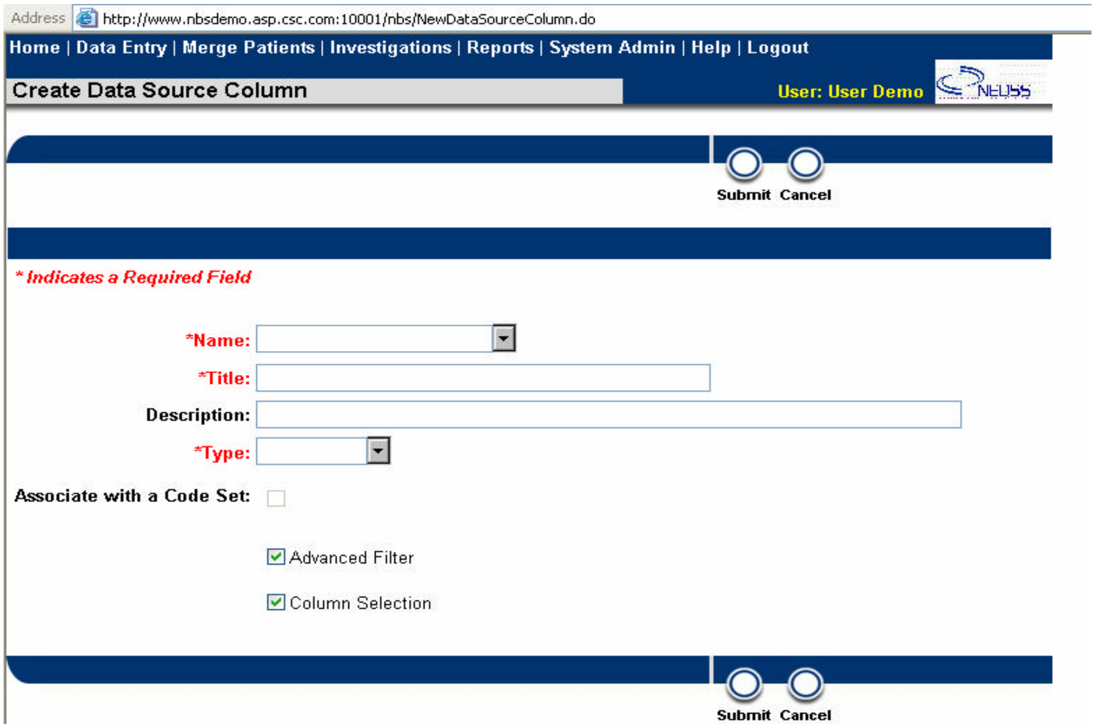
NOTE: If the ‘Delete’ button has been clicked and accepted by the system, the data source column is immediately deleted (however, the data source column can be added back by using the “Create Column” functionality).

NOTE: If the data source column is displayed in reports associated with the data source, the reports must be deleted before the data source column is edited or deleted. The reports can then be recreated.

5. To create a new column, click ‘Create Column.’
6. Select ‘Name,’ ‘Title,’ ‘Description,’ and ‘Type.’

NOTE: The columns available in the “Name” drop-down will only include those columns that are included in the data source that are not currently selected columns (or columns that had been deleted).

7. Click Submit

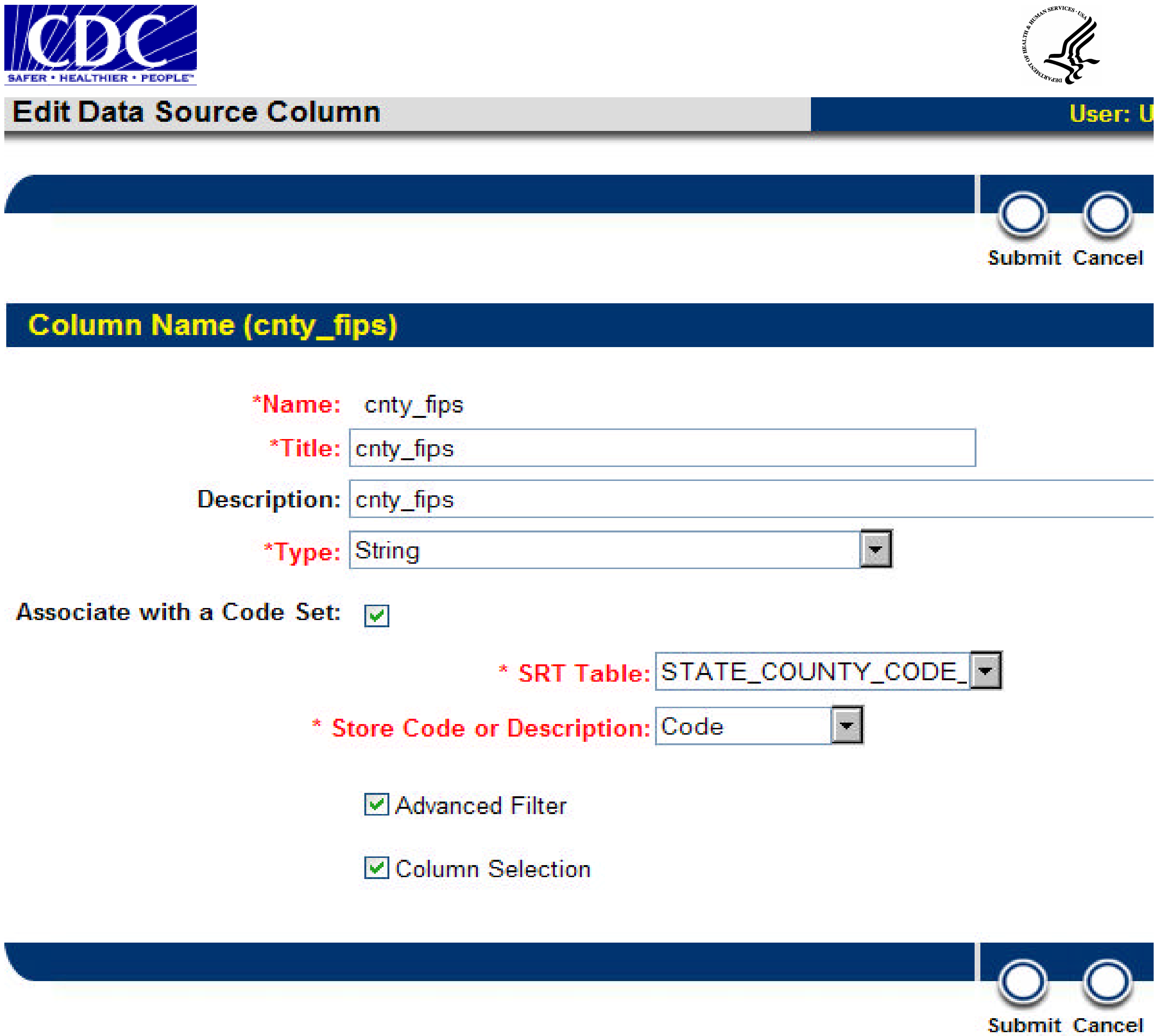


3.5 Mapping Data Source Columns to Applicable SRT Code Sets

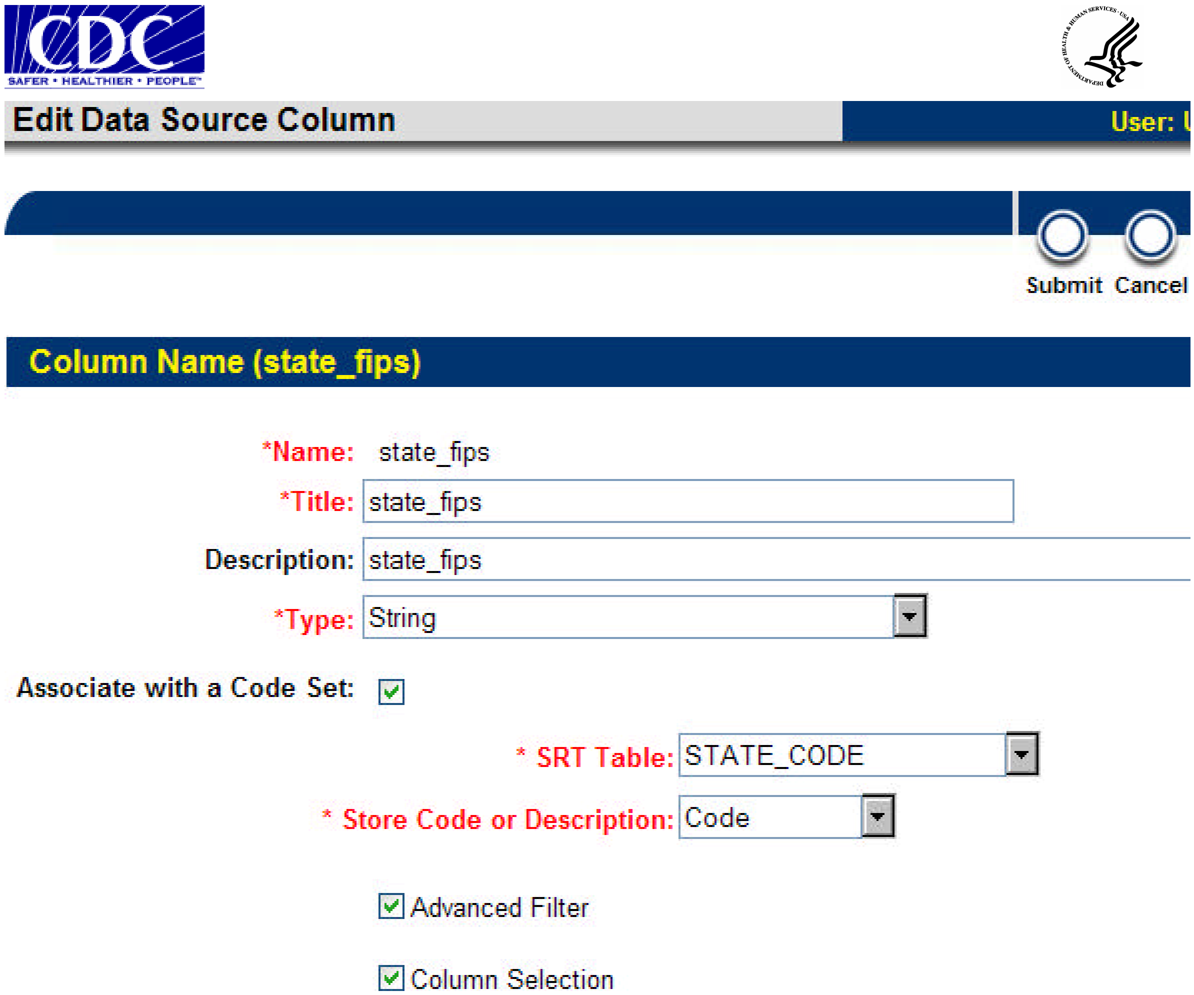
NOTE: For the data sources that come "out of the box", the columns associated with code sets have already been mapped. For data sources that the state registers (either new or existing), the state will have to associate the columns to the applicable code set. This is important to understand because this column-to-code-set mapping will trigger the code set drop-downs in the Advanced Filter in the Reporting Module. The steps below indicate how this might be done using the 'nbs_rdb.ORG_LINE_LIST' data source as an example. To help facilitate the column to code set mapping, see Appendix A.

Mapping a data source column to an applicable SRT code set can be done using the following example:

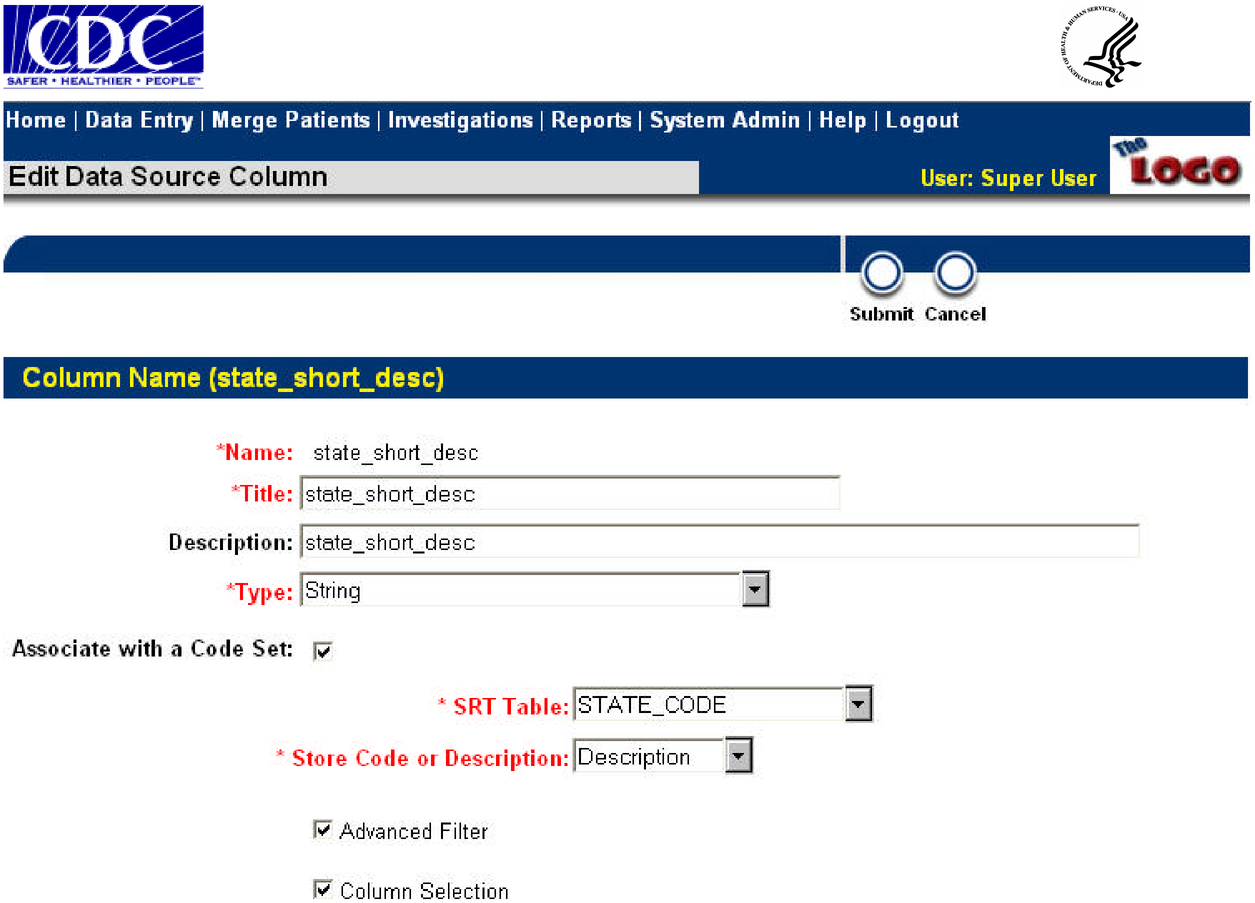
1. Click the 'Data Source' hyperlink on the Report Administration page
2. Click the 'Register Data Source' button
3. Register the data source '**nbs_rdb.ORG_LINE_LIST**'
4. Click Submit
5. From the 'Column Name,' click on **cnty_fips**
6. Click Edit
7. Click Associate with Code Set
8. Select SRT Table = **STATE_COUNTY_CODE_VALUE**
9. Select Store Code or Description = **Code**
10. Click Submit



1. Click ‘Return to View Data Source’ hyperlink
2. Click on **state_fips**
3. Click Edit
4. Click Associate with Code Set
5. Select SRT Table = **STATE_CODE**
6. Select Store Code or Description = **Code**
7. Click Submit



1. Click ‘Return to View Data Source’ hyperlink
2. Click on **state_short_desc**
3. Click Edit
4. Click Associate with Code Set
5. Select SRT Table = **STATE_CODE**
6. Select Store Code or Description = **Description**
7. Click Submit



8. Click ‘Return to View Data Source’ hyperlink

When editing a data source column, the user can select a code set to associate to a column. CODE_VALUE_GENERAL and CODE_VALUE_CLINICAL will trigger a follow-up field, as these tables include many code sets. The rest of the values in the drop-down are actual code sets.

4 Working with Reports

Users with "Report Administration" permission can add reports, edit reports, and delete reports. Functions associated with editing reports include adding, deleting, and editing filters.

IMPORTANT: *All* reports can be deleted by a user that has Report Administration permission. Since this includes the reports that come with the NBS "out of the box", extreme caution should be taken when considering the deletion of a report.

There are two ways to add a report. It can be done from the following screens that are available from the 'Report Administration' screen:

- View Data Source
- Reports

4.1 Adding a Report from the View Data Source screen

To add a report from the 'View Data Source' screen, follow these steps:

1. From the 'Report Administration' page, select 'Data Sources'
2. Select a data source from the list by clicking on a data source name (e.g., nbs_rdb.ORG_LINE_LIST)
3. From the 'View Data Source' screen, click the 'Create Report' button

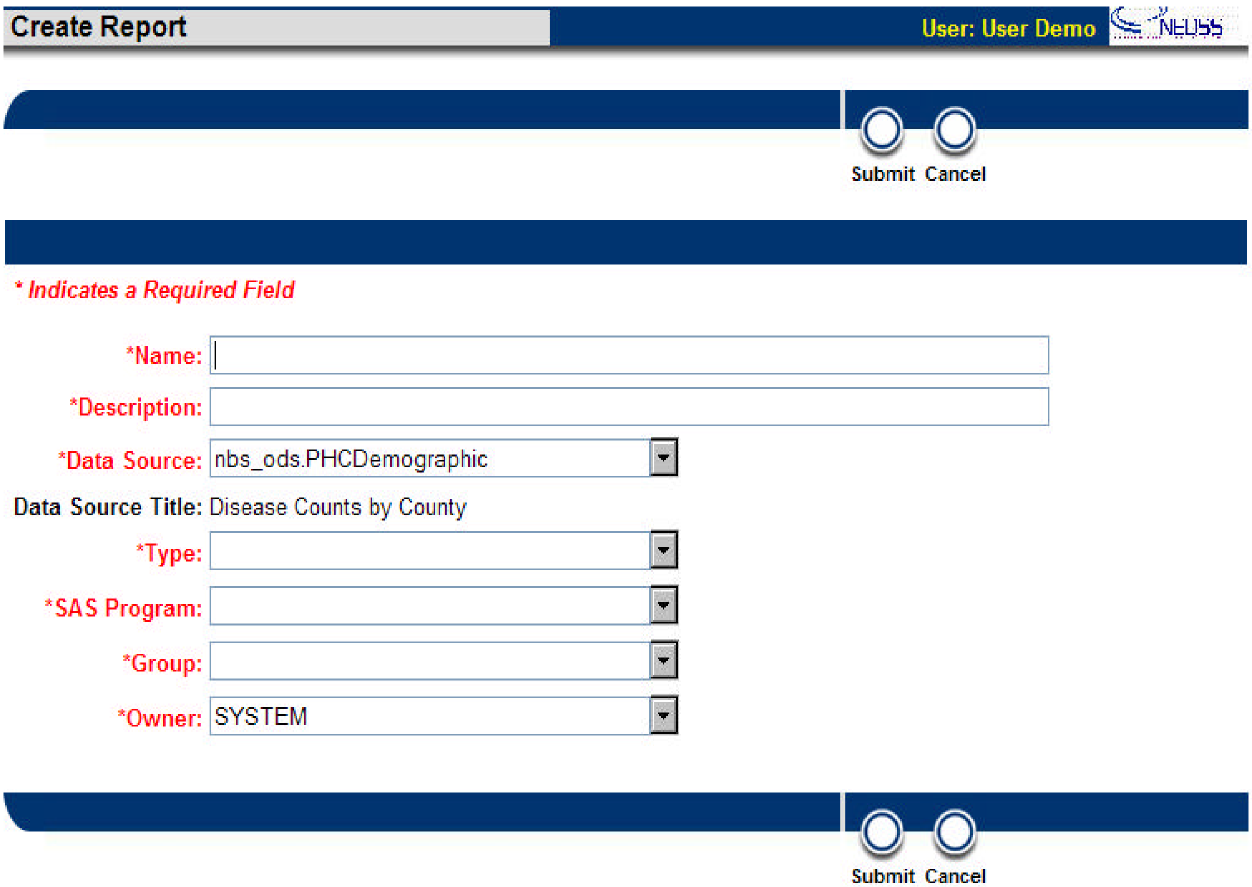
4. Enter Name and Description
5. Data Source is pre-populated with the name of the data source
6. Select Type = **Custom**
7. Select SAS Program = **NBSCUSTOM.SAS**

NOTE: When creating a report, the user will always select Type = **Custom** and SAS Program = **NBSCUSTOM.SAS** unless they created their own SAS program for a particular Data Source that requires a Graph or a Table.

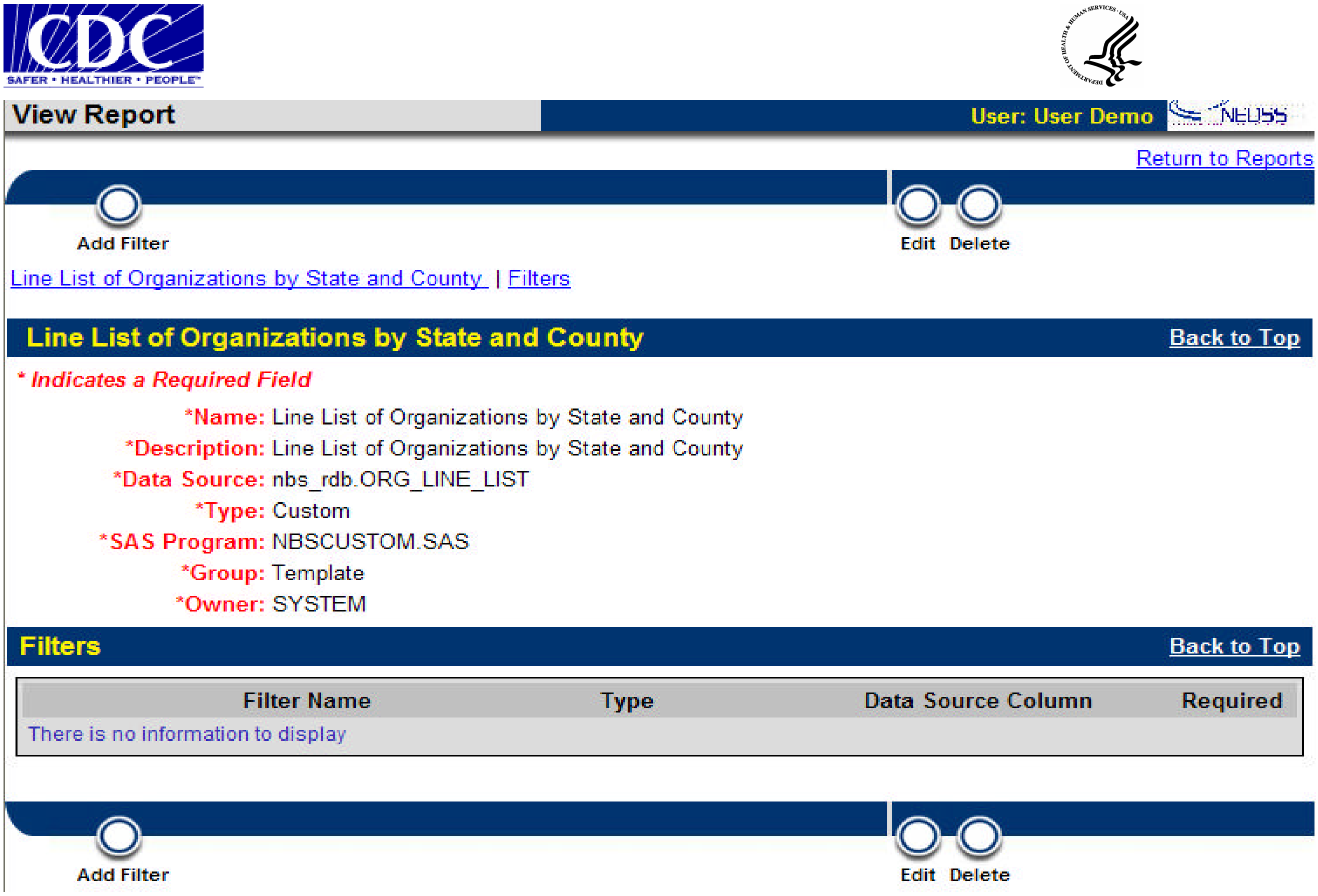
8. Select Group = **Template**

9. Select Owner = **System**

NOTE: The Owner is the user that can delete or modify the report in the NBS Reports Module. When creating a report the Owner is set to "System", meaning that the report cannot be deleted in the Reports Module and only can be deleted in the Report Administration Module.



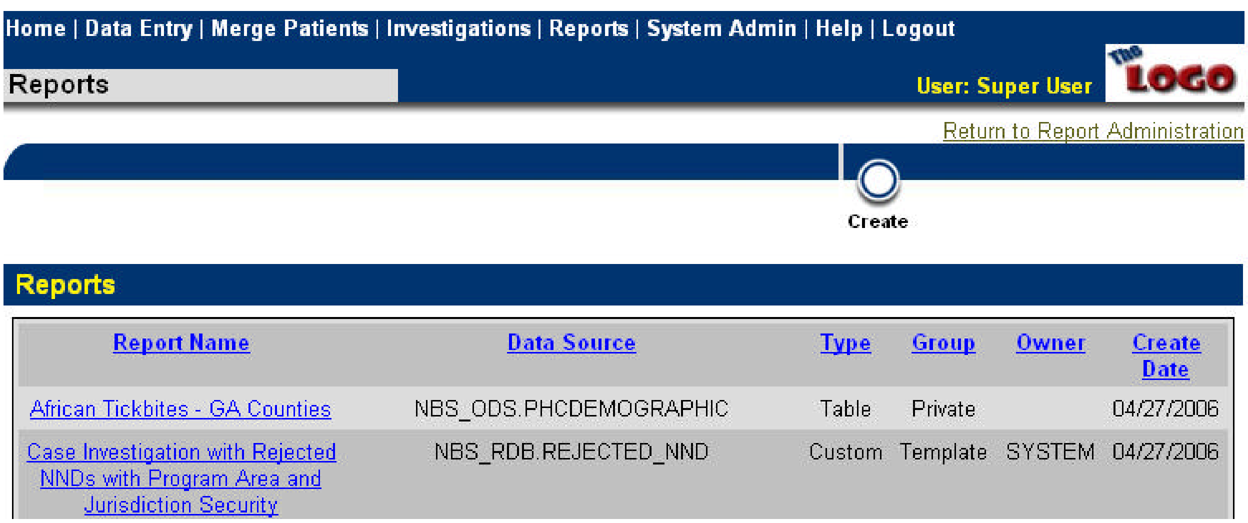
10. Click Submit (Application navigates to View Report page.)



4.2 Adding a Report from the Reports screen

To add a report from the 'Reports' screen, follow these steps:

1. From the 'Report Administration' page click 'Reports'
2. Click the 'Create' button



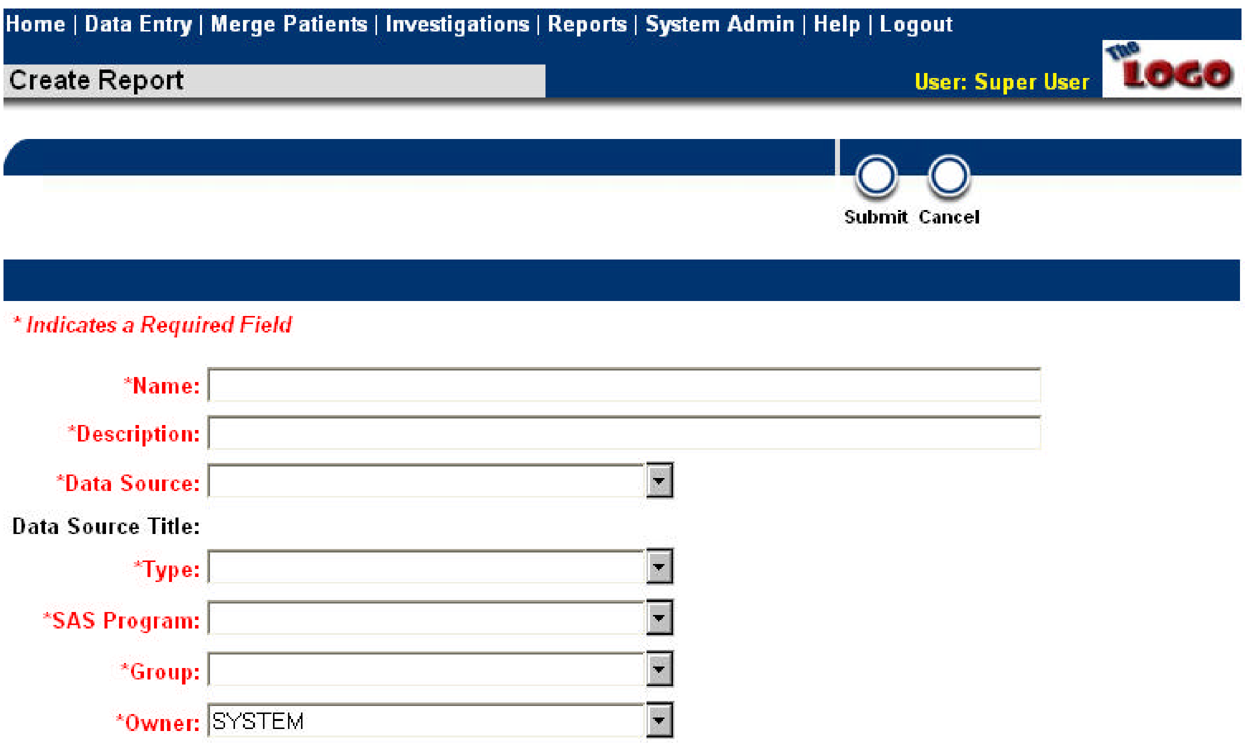
3. Enter Name and Description
4. Enter the name of the report
5. Enter the description of the report

6. Select the data source from the drop-down list
7. Select Type = **Custom**
8. Select SAS Program = **NBSCUSTOM.SAS**

NOTE: When creating a report, the user will always select Type = **Custom** and SAS Program = **NBSCUSTOM.SAS** unless they created their own SAS program for a particular Data Source that requires a Graph or a Table.

9. Select Group = **Template**
10. Select Owner = **System**

NOTE: The Owner is the user that can delete or modify the report in the NBS Reports Module. When creating a report the Owner is set to "System", meaning that the report cannot be deleted in the Reports Module and only can be deleted in the Report Administration Module.

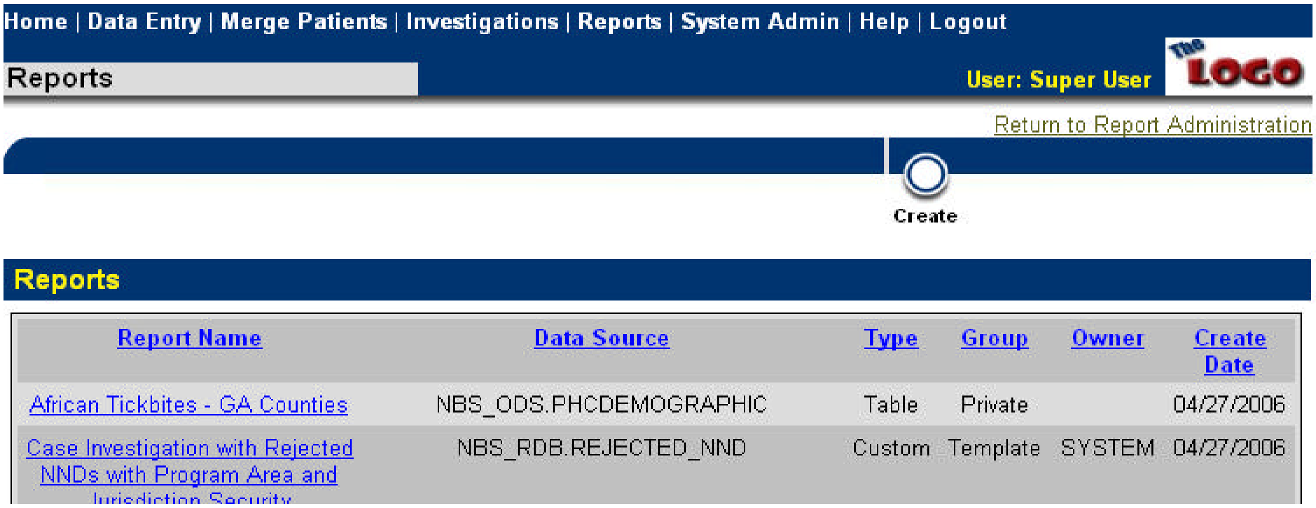


11. Click Submit (Application navigates to View Report page.)

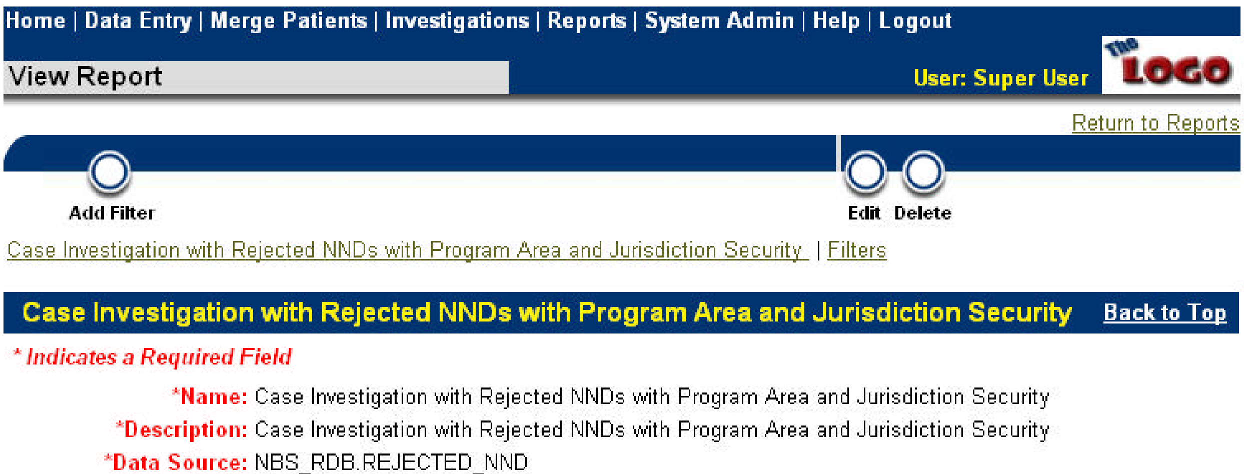
4.3 Deleting a Report

To delete a report, follow the steps below:

1. From the 'Report Administration' screen, select 'Reports'



2. Select the report to be deleted from the list of reports by clicking on the name



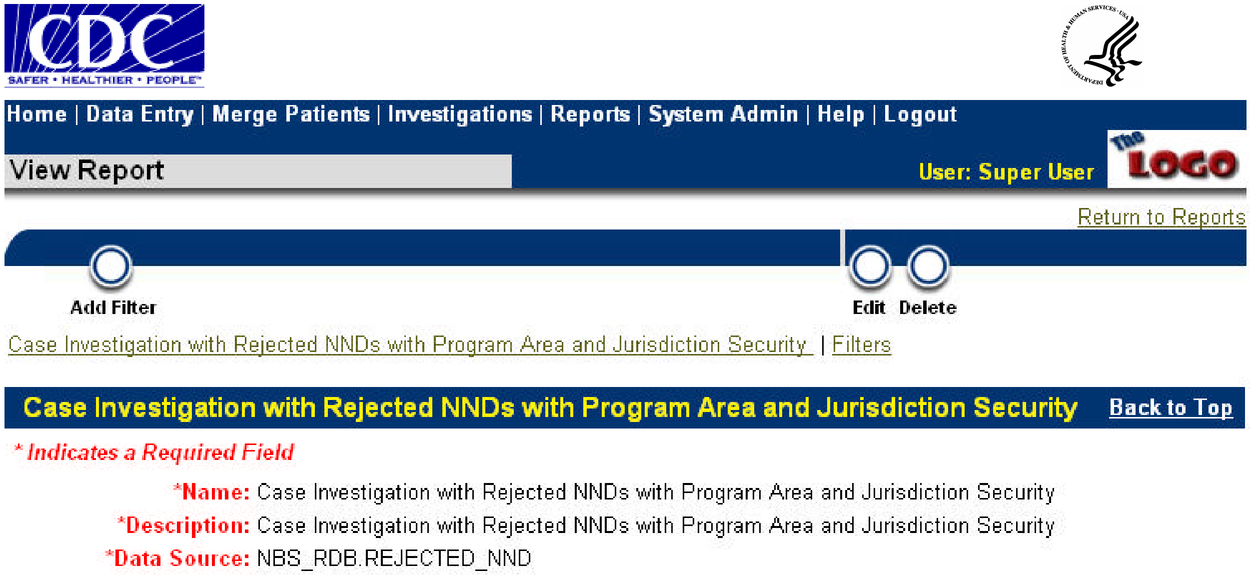
3. Click the 'Delete' button

NOTE: This action will delete the report. There will be no dialog box asking for confirmation. Use this function with great caution.

4.4 Editing Reports: Adding Report Filters

To add report filters, follow the steps below:

1. From the 'Report Administration' screen, select 'Reports'
2. Click 'Add Filter' button



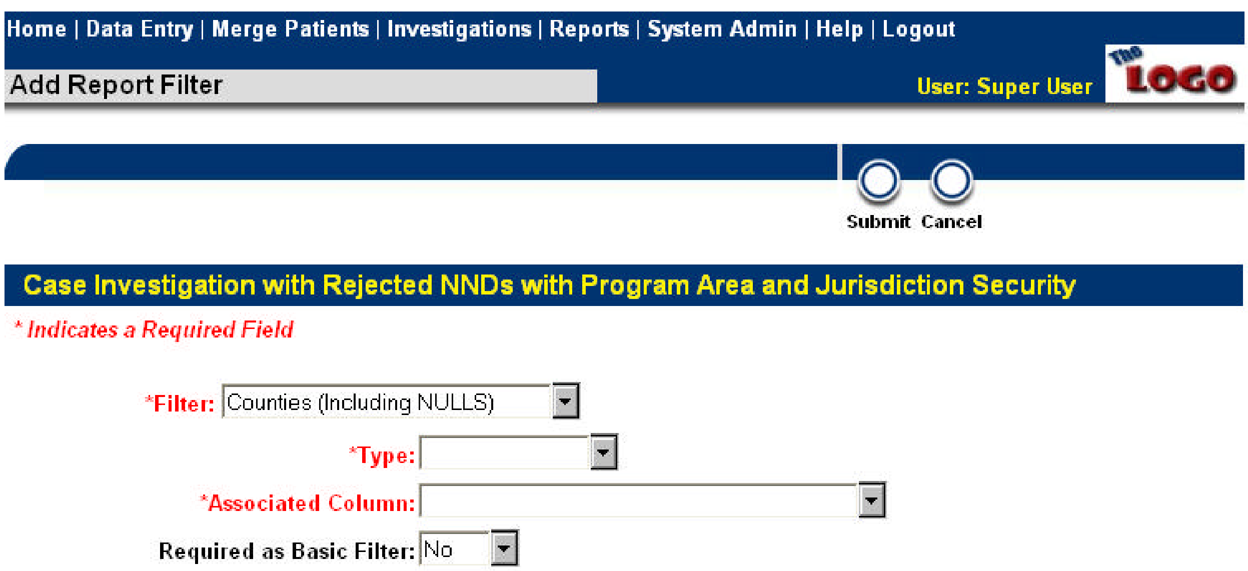
3. Select a Filter from the drop-down

NOTE: Selecting a Filter opens up drop-down menus for Type and Associated Column

4. Select a Type from the drop-down
5. Select an Associated Column

NOTE: This maps the Filter to the applicable column in the data source.

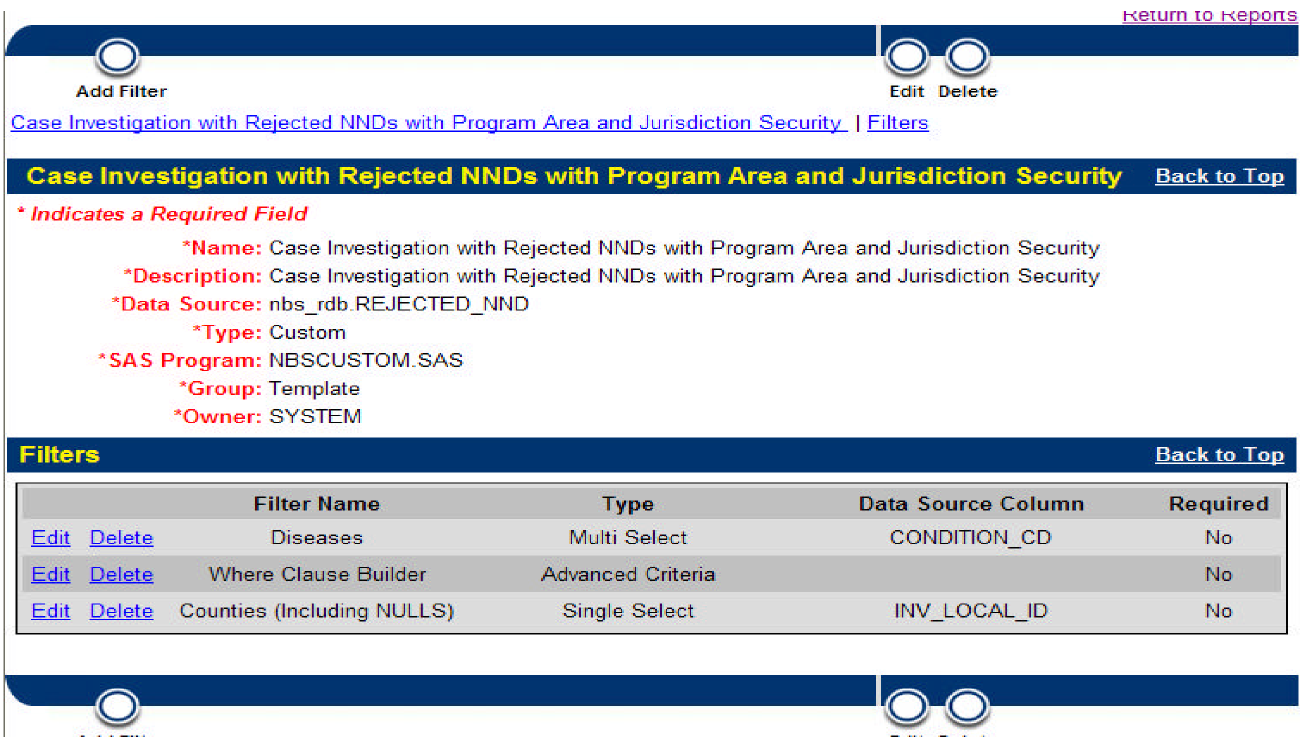
6. Select Required as Basic Filter = **NO**



7. Click Submit (Application navigates to View Report page.)
8. Click ‘Add Filter’ button
9. Select Filter = **Where Clause Builder**

NOTE: When adding report filters the user must add the "**Where Clause Builder**" filter in order for the Advanced Filter to work when running the report in the NBS Reports Module.

When adding report filters "Associated Column" maps the filter to the applicable column in the associated Data Source.

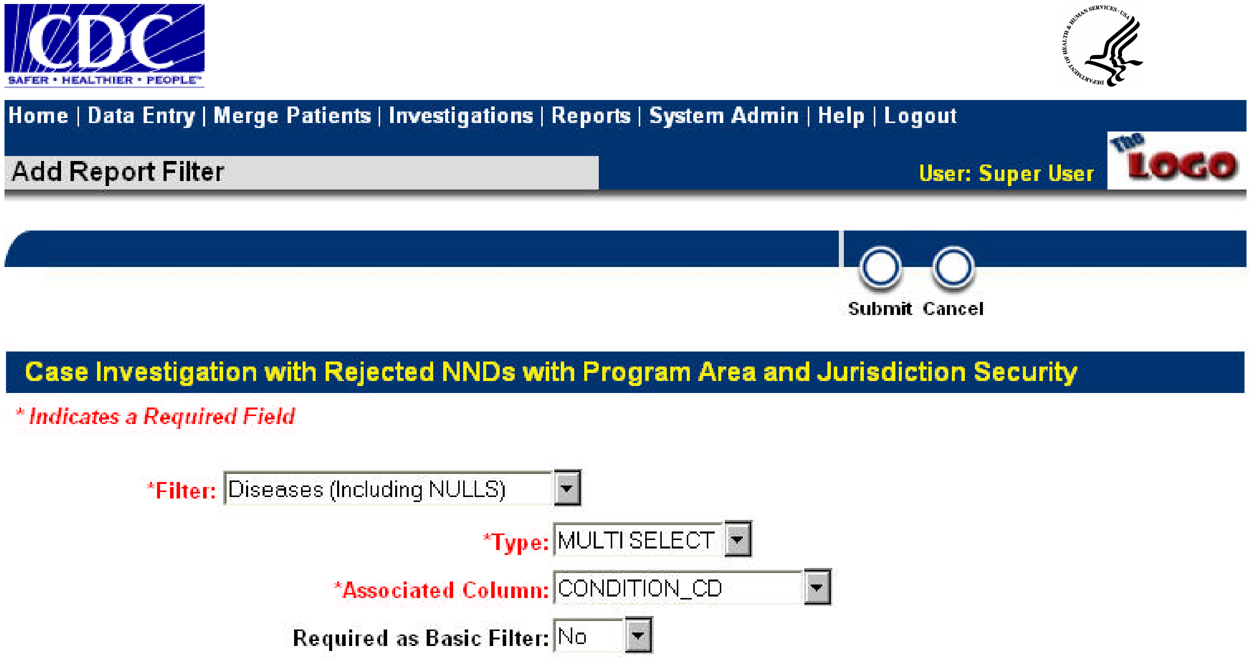


10. Click Submit (Application navigates to View Report page.)

4.5 Editing Reports: Editing Report Filters

To edit report filters, follow the steps below:

1. From the 'Report Administration' screen, click 'Reports'
2. Select the report from the list of 'Report Names'
3. Select the filter to be edited by clicking 'Edit' next to the filter name
4. On the 'Edit Report Filter' screen, make desired edits



5. Click ‘Submit’

4.6 Editing Reports: Deleting Report Filters

To delete report filters, follow the steps below:

1. From the ‘Report Administration’ screen, click ‘Reports’
2. Select the report from the list of ‘Report Names’
3. Click ‘Delete’

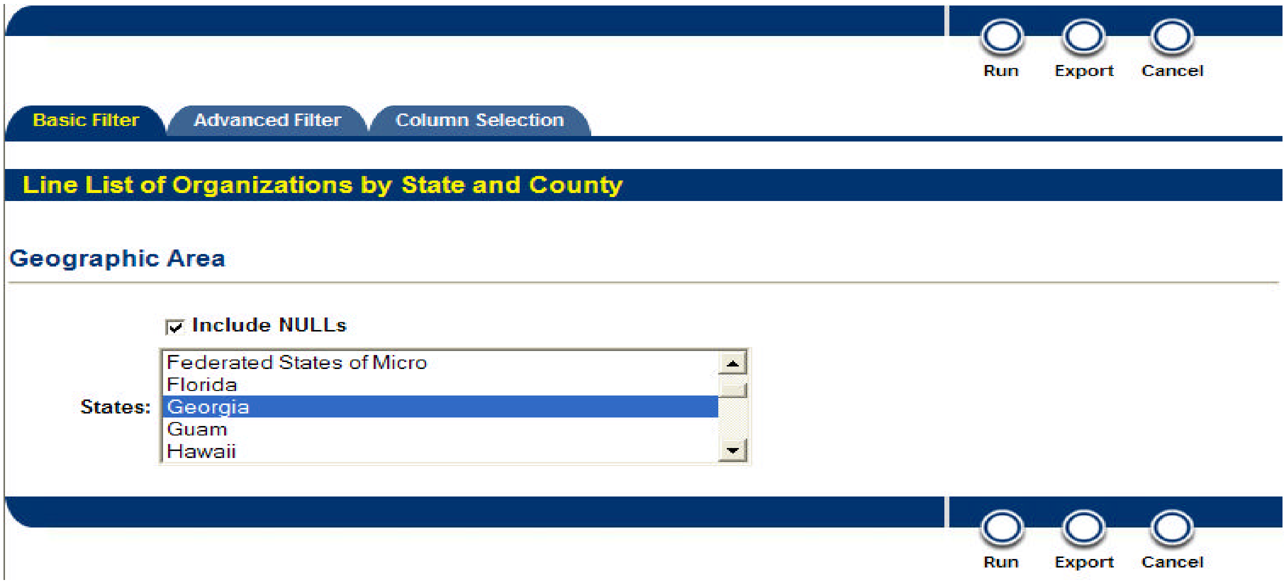
NOTE: This action deletes the filter. There is no dialog box asking for confirmation. Use this function with great caution.

4.7 Running Newly-Created Reports

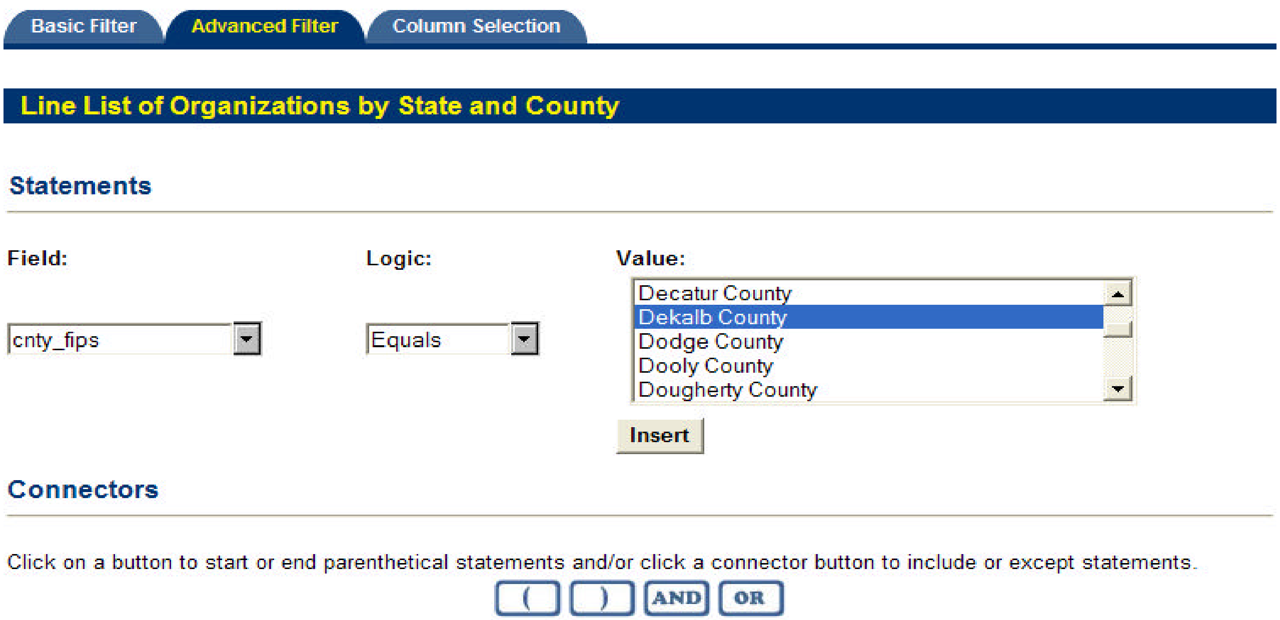
NOTE: The example below assumes that you have followed the previous steps in the document including:

- Registering nbs_rdb.ORG_LINE_LIST as a data source
- Mapping the data source columns to applicable SRT code sets
- Creating a report
- Adding report filters

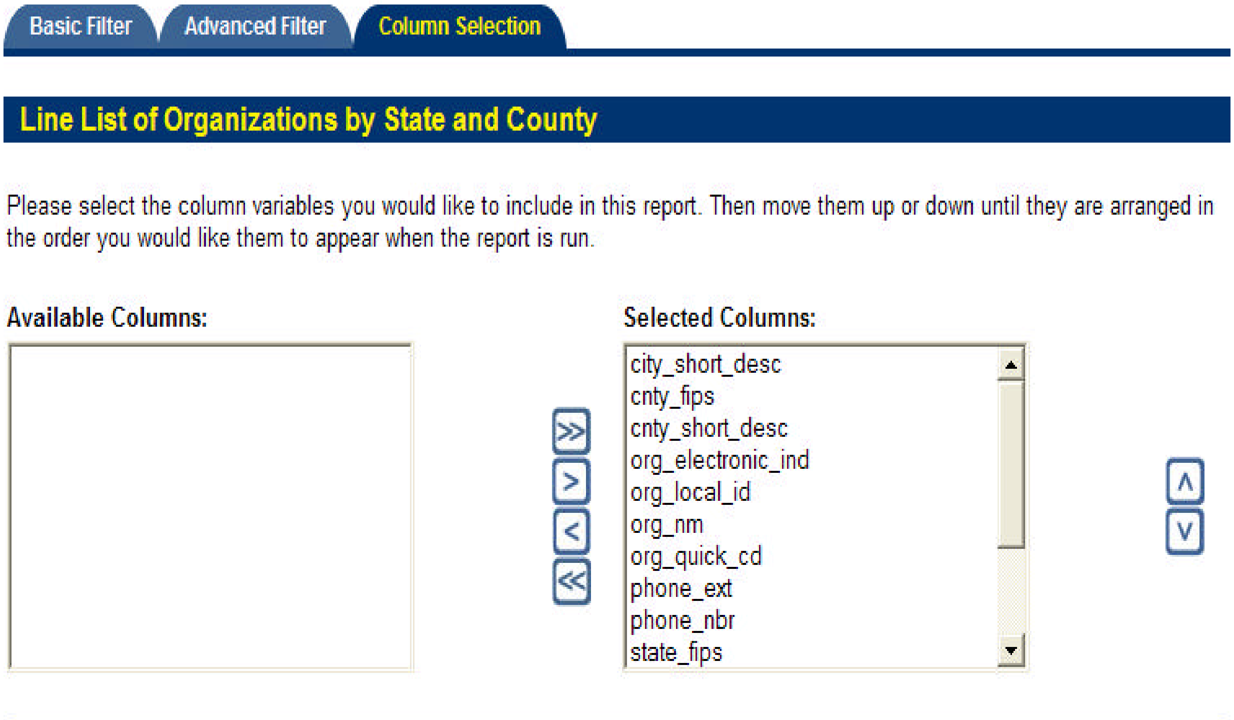
1. Click ‘Reports’ on Main menu bar. (Your report will display in the Report Template section within the Report module.)
2. Select Run (for the newly created report)
3. Select your **State** and **Include NULLs** on the Basic Filter Tab



4. Click on Advanced Filter
5. Select Field = **cnty_fips**; Logic = **Equals**; Value = **select County or Counties**



6. Click Insert
7. Click on Column Selection tab
8. Select **All Columns**

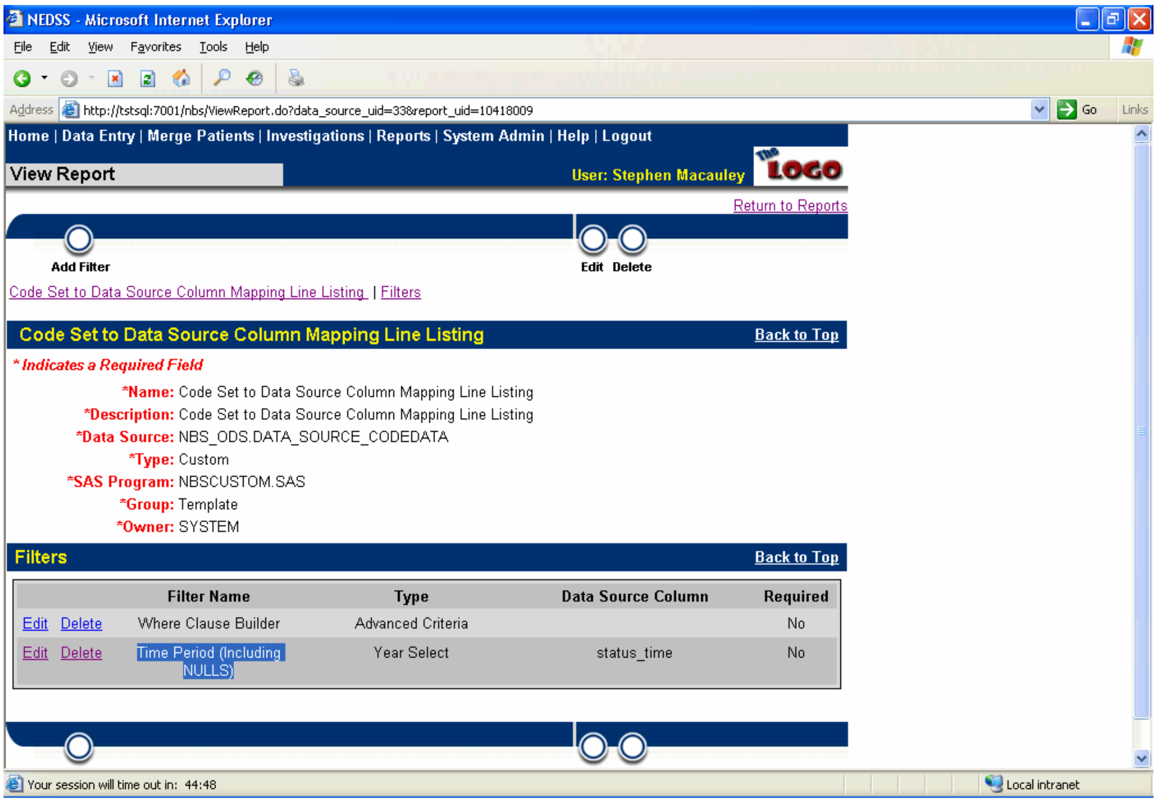


9. Run the Report

Appendix A

To determine the code sets mapped to each data source, a user with "Report Administration" permission can register nbs_odse.data_Source_codedata as a data source and create a report that will allow them to export/view the code set to data source mappings.

Below is a sample report that can be created:



Revision History

Date	Description	Author
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December 18, 2007	Edited text and screen shots	Shannon Joyce
December 19, 2007	Edited text and screen shots	Hugh Kelsey
December 20, 2007	Edited text and screen shots	Shannon Joyce
January 3, 2008	Edited text and screen shots.	Jay Nelson